

# The empowered consumer

The key to deeper consumer relationships:  
reducing the noise around decision-making

# Introduction

In the last three months of 2023, 74% of consumers walked away from purchases simply because they felt overwhelmed, according to Accenture's Consumer Research 2024.<sup>2</sup> Despite companies' increasing focus on customer-centricity and personalized experiences over the past few years, most people (71%) see no improvement or even see an increase in the time and effort required to make a purchase decision.

It's no wonder. Consumers today face a seemingly endless number of choices, messages, ads and claims. Recommendations from friends, family, influencers, algorithms and apps only add to the noise, and this information overload is impacting people's confidence in their purchase decisions. Surprisingly, our analysis reveals this to be an issue regardless of the relative cost or frequency of a purchase. Choosing small items like moisturizer can be as challenging as selecting big ticket items like a washing machine.

But there's good news both for consumers and the companies seeking to serve them: New and

emerging AI tools can help companies deliver hyper-personalized experiences that not only cut through the noise, but also simplify decision-making, deepening loyalty in the process.<sup>3</sup>

Consumers are ready. Based on our research, we believe that consumers are on track to adopt generative AI-powered advisors at scale over the next two years, as they increasingly seek to lighten their workloads associated with making purchases. More than half (51%) of the consumers in our study are already open to using conversational AI solutions.

**Ultimately, we expect this shift to trigger the largest reconsideration in decades of what and how consumers buy. The question is how consumer-facing companies can best harness technology to be where people are when making decisions, and to make the experience easier. Those who empower consumers with easier decisions will earn deeper loyalty, leaving competitors behind.**

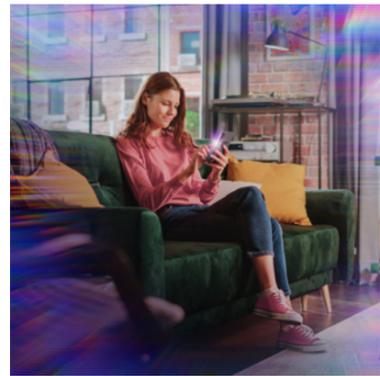
Accenture's survey of **19,000 consumers** from **12 countries** offers fresh insight into consumers' experiences in making purchasing decisions across categories.

**75%** of people surveyed feel bombarded by advertising and **73%** feel overwhelmed by too many options, as one respondent told us: "Finding information is easy, but [it is] difficult to make a decision from so much."<sup>1</sup>



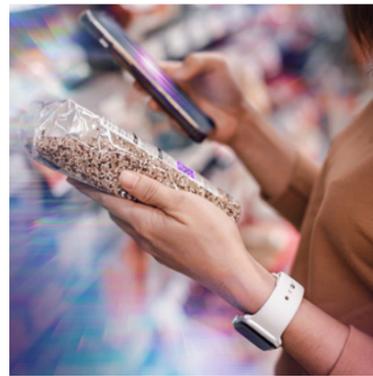
# Contents

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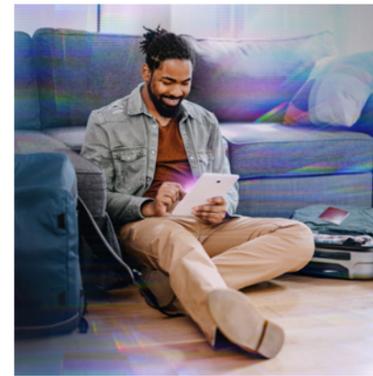
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**Shaping the ultimate in consumer empowerment**



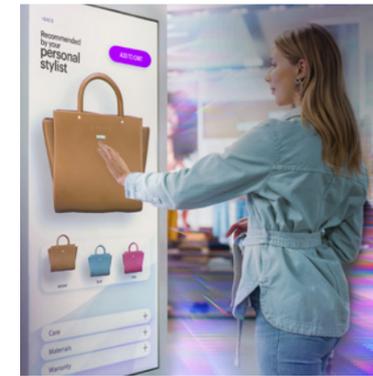
09

**Discovery:  
From confusion to clarity**



14

**Conversion:  
From transactions for anyone to experiences for someone**



20

**Loyalty:  
From brand purpose to human purpose**



25

**Be data-powered and delightfully human**





# Shaping the ultimate in consumer empowerment



Unlike previous tech-driven tools, generative AI can enable companies to understand each individual consumer to a degree that was impossible before by picking up on the intricacies that surround any given choice. Using this granular, life-centric knowledge, they can get to know their consumers as real, evolving people rather than as lists of transactions — and curate uniquely personal experiences that cut through the noise.

Search is a critical component of how consumers start the purchase journey, and some are already engaging with a new process by searching for their need than for the solution. It's the difference between "I want to find this item" and "I want to solve this problem" — or "I want a recipe for lasagne" versus "what can I cook for eight people with these dietary factors?" Generative AI is upgrading simple searches to more nuanced, semantic ones, which is becoming a vehicle for empowered decision-making.

Search is also becoming infinitely more transparent, and the challenge for companies lies in defining how best to engage in this new environment. To show up as a result in semantic searches, companies will need to allow third party generative AI-powered tools access to product details on their website. For semantic search on their own channels, they must also develop data sets that go beyond product attributes and include an understanding of the contexts in which a certain product could be the right solution.

Every purchase decision is both personal and situational. This means working to understand what consumers need and how they want to engage — it means understanding everything from their preferred channels and formats to day-to-day influences on their purchase decisions. In some instances, consumers will simply want to grab and go, while in others, they'll be keen to invest a greater level of consideration. In different contexts, a consumer may want to browse independently, obtain expert advice, or even outsource the choice completely.



Figure 1 offers a look at three such decision-making scenarios and describes how AI tools could help companies find the right note to strike at the right time in each.

**Figure 1: Decision making scenarios**

	I want to make a decision independently	I want active help to make a decision	I want the decision to be made for me
<b>Purchase Type</b>	Simple/straight-forward or very complex	Experiential, important or unfamiliar	High frequency and/or high effort
<b>Need</b>	<p>"I want to make a quick decision"</p> <p>"I want to be in control"</p>	<p>"I need advice to make the right choice"</p> <p>"I want to see, try and test"</p> <p>"I want to feel special"</p>	<p>"I don't want to spend time on this"</p>
<b>Challenge</b>	Bombarded by advertising, confused by terminology, and/or overwhelmed by options. May also face high workload involved in researching potential choice	Generic chat bots with limited ability to tailor advice to specific needs. 'Personal touch' from real-life advisors only where accessible	Static subscription services add to the workload because they are cumbersome to adapt when changes inevitably need to be made
<b>Opportunity</b>	<p><b>Curated experiences</b></p> <p>Use generative AI, AI and other technologies to anticipate an individual's needs, deliver targeted content and make hyper-transparent recommendations accordingly</p>	<p><b>Generative AI advisors</b></p> <p>Fast track the discovery process, showcase the options, and deliver expert, personalized advice be it through an AI persona or real-life employee interactions</p>	<p><b>Generative AI agents</b></p> <p>Act as a consumer's personal assistant; capable of taking on complex decisions and actioning them autonomously in order to reduce the mental and physical effort required to make decisions</p>





One of the burden-lifting tools generative AI can power, for example, is transparency in search. Imagine a consumer searching for a particular brand and cut of jeans available with numerous retailers. A generative AI-powered search could know if price is usually the most important factor influencing that consumer's final decision to buy. It would then spotlight the cheapest option in the results so that they wouldn't need to trawl through innumerable search results. In another setting, it could just as easily know that a consumer's priority is usually delivery time, an easy returns process, or a preference for a local bricks-and-mortar store. It could spotlight the best option for the consumer as appropriate. And it could learn where and when consumer's priorities generally shift, and tailor its responses accordingly.

AI-powered search can do all this while being remarkably "human"— even as it possesses attributes that only a machine can deliver at speed. It's a powerful blend. The technology, like a human, has the capacity to understand context, to engage, learn and even build relationships, and offer nuanced recommendations. But unlike people, AI-powered advice is fed by virtual

libraries that constantly update themselves and can quickly draw relevant, actionable insights from endless sources of information.

Take UK retailer Marks & Spencer's acquisition of Thread as an example — a move that has added substantial revenue through enhanced personalization.<sup>4</sup> Thread's proprietary technology now enables the brand to make recommendations based on style, size and budget, helping consumers get from search to purchase with less effort.

As consumers rely more on these advisors to decide what to buy, advisors will learn more about them — even if their preferences change. So, the AI tool becomes increasingly relevant and sophisticated as time passes. It's a vehicle that supports more sophisticated information processing and decision-making by introducing an interpretation layer that takes some of the workload for the consumer.

It's the ultimate in consumer empowerment.

Relevance builds relationships. Empowering consumers through generative AI will transform how they think about brands such that they become a part of a person's life beyond a single purchase. **To remain relevant into the future, companies must rapidly build deep and hyper-personalized relationships — generative AI will enable them to do this on a scale never seen before.**

That's why early movers can capture a distinct competitive advantage. Companies that watch and wait are unlikely to catch up. Early movers already have the advantage: they're 3.7x more likely to be using generative AI to identify new and unmet needs.<sup>5</sup>

We're already seeing the very first movers use generative AI to break down the barriers to consumer intimacy and enable true segmentation of experiences at scale. We're seeing them adapt their ways of working to get the most from generative AI and other technologies. They're overcoming challenges that have plagued them for years and discovering how to enrich human connections across the purchase journey while preserving consumers' agency.

Specifically, they're making fundamental shifts across three key phases of the consumer journey — **discovery, conversion** and **loyalty** — to reinvent the relationships they have with consumers and the role they play in their lives (see figure 2).

Figure 2: Fundamental shifts across the consumer journey

## 01 Discovery

From confusion to clarity

Tailor advice for consumers so they have the facts and insights to make decisions confidently.

## 02 Conversion

From transactions for anyone to experiences for someone

Design personalized experiences that influence consumers to act.

## 03 Loyalty

From brand purpose to human purpose

Create a partnership that's human by design to build trust and earn loyalty.





**01**

# Discovery

From confusion to clarity



# Tailor advice for consumers so they have the facts and insights to make decisions confidently.

## Where consumers are

Consumers are hungry for fact-based guidance to make informed purchase decisions. As evidence of this, Google searches for “expert” or “dermatologist” related to beauty products are up 67% since 2020, and searches for “FDA approved” pharmacy items doubled in the same period.<sup>6</sup> What’s motivating this need? Consumers find it difficult to evaluate and compare purchase options — most (72%) find this hard because metrics and terminology aren’t consistent. So much so that 78% are unsure whether a product will even deliver on its promises.

# 75%

of consumers wish they could identify options that meet their needs more quickly and easily.

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## Where consumer-facing organizations should go

Whether as intuitive digital services or human agents, generative AI-powered advisors are an incredibly accessible way to access the hyper-personalized advice that consumers crave. This is the magic of large language models, which deliver fact-based, tailored guidance that mass marketing campaigns can't match. We expect the rise of generative AI-powered advisors to fundamentally redirect the role of consumer marketing away from mass advertising and toward evidence-based information. It provides marketers an upgrade from offering generic advice at arm's length to specific recommendations tailored to each consumer.

Generative AI-powered advisors can calm the confusion consumers feel by helping them compare options based on the metrics they care the most about — whether those are benefits, sustainability credentials, nutrition labels or something else. Companies must ensure this information is credible and surfaced in the right ways. Manufacturers in particular will need to ensure transparency not just in attributes like ingredients or efficacy but across the full value chain, and if any details are likely to cast a

bad light, that will prompt changes to elements like formulations, suppliers or packaging.

By using generative AI and other technologies, they can create images, video, or audio to “show” rather than “tell” consumers how products could fit into their lives. For example, Haut.AI uses a portrait photograph and simulates how the sustained use of various beauty products could change consumers' skin over time, bringing its messaging to life.<sup>7</sup>

Consumer-facing organizations can also use generative AI-powered advisors as an opportunity to provide people with expertise, at scale — which is just what Marriott is doing. Part of a pilot program at its Renaissance hotels, RENAI is like a local insider who knows all the best restaurants, secret spots, and can't-miss attractions at a destination. In a fusion of new tech and traditional hospitality, hotel associates who know their cities well helped to train RENAI. Guests no longer have to wait until check-in to meet RENAI — they can connect before they leave home.<sup>8</sup>

Generative AI-powered advisors and tools aren't just for consumers, but for frontline employees, too — the original guides on the side. Retail associates, airline gate agents and hotel front desk clerks can smooth the discovery process with “eyes up” experiences that combine AI with edge and spatial computing to prompt employees with the next best actions while interacting naturally with consumers, instead of continually looking down at a screen.

“Generative AI-powered advisors can calm the confusion consumers feel by helping them compare options based on the metrics they care the most about.”



# Empowering agents to personalize conversations

A **European auto giant's** sales agents have so much consumer data that they struggle to frame conversations. The company is developing an AI-powered sales tool that would create summaries including information on consumers' owned vehicles, past test drives and preferences. The tool would draw on what the company knows about consumers' lives and personalities to help sales agents personalize the interactions and services they offer. Insights like these can change the style and content of conversations that sales agents have with consumers, as well as evolving the sales role and shifting the focus from transactional to strategic. Sales agents already know the products well, so this tool would enable them to bring those products to life in ways that are expressly relevant for each individual client.



# What do consumers expect of generative AI-powered advisors?

Consumers want to know their data is secure; they want to understand the bigger picture; and they want to be able to count on the companies they buy goods and services from to do right by them. To build trust and adoption, while reducing harm, companies need to build responsibility into a systematic approach to designing, deploying and using generative AI.

## 1. Personal data protection

85%

of consumers say personal data protection is important when using conversational AI tools.

**Consumer-facing companies should build in the transparency around how consumers' data is protected.**

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## 2. Transparency

81%

of consumers want to know what's behind purchase recommendations from conversational AI tools.

**Companies will need to explain how their recommendations are generated across channels.**

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## 3. Reliability

81%

of consumers say purchase protections are important for purchases made through conversational AI tools.

**Companies will need to work out how to offer details on guarantees and returns policies when purchases are made through conversational interfaces, as they have done through digital commerce.**

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02

## Conversion

From transactions for anyone  
to experiences for someone



# Design personalized experiences that influence consumers to act.

## Where consumers are

Consumers are feeling a lot of pressure at the point of purchase. Fifty-six percent say that it's more important today that they make the right purchase decision than it was three years ago. Yet, 61% don't find it easy to evaluate a product's credentials at the point of purchase in store.

On average across categories,

# 63%

of consumers have had the frustrating and disappointing experience of attempting to buy a product only to find that it is out of stock.

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## Where consumer-facing organizations should go

Transforming the discovery process doesn't always close the deal. Conversion comes down to what happens at the point of purchase, and consumers don't all share the same expectations. Generative AI enables marketing messages to be hyper-personalized, and makes shopping hyper-responsive, whether a consumer wants hands-off independence, white-glove experiences, or something in between.

For consumers seeking independence, multi-modal search engines imitate the flexibility and agility of the human mind to create more accurate search results. They use advanced technologies such as natural language processing, computer vision, speed recognition, and machine learning to process different types of input like voice, image, video and gesture.

For companies, analyzing search semantics allows an understanding of the intent and context behind a user's search rather than simply matching keywords to recommendations. This could make the shopping

experience significantly more personalized, adding value and easing the information gathering workload.

Semantic search is a way of introducing consumers to conversational AI. If they are already familiar with a more tailored response than traditional search, the likelihood of adopting more conversational interactions going forward will increase. This is not easy, as most data companies hold is based on product attributes and lacks an understanding of the moments when consumers may want them. High quality data must be the starting point for any AI development and anything less risks consumer trust. Structured data like master product data will be crucial but algorithmically generated synthetic data will also become more important for filling in gaps in existing data, mitigating against bias, and improving data diversity.

The opportunity for companies is to use AI tools to support consumers at the point of purchase — on their terms. This could mean taking over the aspects

of purchasing that consumers don't enjoy. As an example, take the notoriously complex task of booking flights and hotels. By integrating ChatGPT and other AI-based shopping capabilities into its app, Expedia is making booking much easier. Consumers can have open-ended conversations with the generative AI advisor to finalize their selections and then move seamlessly to Expedia check-out to purchase.<sup>9</sup> We predict that by 2029, AI advisors will receive more search traffic than traditional search engines.<sup>10</sup>

“ The opportunity for companies is to use AI tools to support consumers at the point of purchase — on their terms.”



Technologies can also help companies make the purchase transaction part of a fluid and tailored omnichannel experience. French home improvement retailer Bricorama has set an impressive standard here. Its generative AI-powered “**pAInt**” advisor guides consumers through selecting paint for their do-it-yourself projects. The online advisor asks the consumer about their project, shows images based on style trends, and recommends colors. Through a two-way conversation, it can then advise on the right paint for the surfaces, quantities based on room size, and tutorials for decorating at home.<sup>12</sup> The advisor is trained on Bricorama’s patented data, with safeguards in place to limit its responses to home improvement projects only. Crucially, pAInt is fully integrated with Bricorama’s e-commerce systems, so consumers can easily buy the products it recommends, reducing stock disappointments and errors. It’s also being rolled out to employees so they can better support consumers at the point of sale.

Looking ahead, supporting consumers at the point of purchase may not involve consumers at all. This is a future of AI2AI shopping where companies’

generative AI-powered advisors deal directly with consumers’ generative AI agents. No humans involved. Nearly all (96%) consumer executives agree that AI agent ecosystems will be a big opportunity for their organizations in the next three years. Unlike generative AI advisors, AI agents work autonomously. As proxies for humans, they know their preferences, budgets, calendars, household patterns and can buy things for them that fit with their lives.

“With ‘pAInt,’ we’re offering a ‘made-to-measure’ online experience, which can then be rolled out in-store, as an extension of its omnichannel purpose.”<sup>11</sup>

**Laurent Pussat,**  
President of Les Mousquetaires Group’s  
DIY chains, including Bricorama



On average across categories,

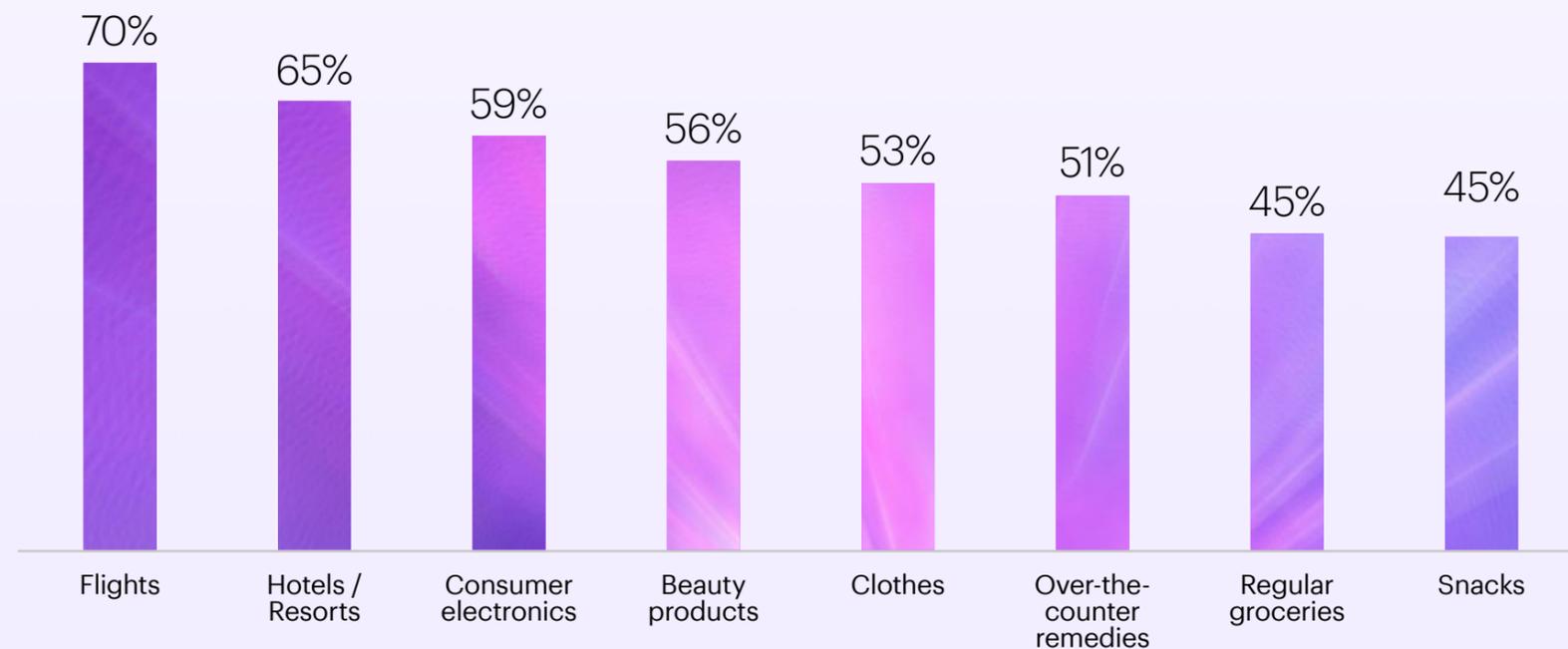
# 55%

of consumers are open to using generative AI agents to purchase for them.

**Figure 3: Likelihood to use generative AI agents**

**Likelihood to use AI agents**

Percentage of respondents who report they are likely or very likely to use AI solutions when purchasing specific categories



### What can this look like?

Suppose a personal generative AI agent designed a weekly meal plan targeted to nutrition goals, ensuring that all items are in stock at the local store. It can make the purchase and arrange delivery at a convenient time. Throughout the week, it can also remind the consumer what's for dinner and when to start prepping. Consumers can also tailor the process to be more or less hands-on or hands-off on any given day or week. Walmart announced a step towards this vision at CES 2024 with its InHome Replenishment program.<sup>14</sup> The program can anticipate needs and place orders to be delivered directly to consumers, automating the entire shopping experience.



# In the spirit of conversion

Alcoholic beverage company **Brown-Forman Corporation** is using AI to shift consumer messages on product display pages across its brand portfolio. To win the digital shelf, the company aligns the messages it shows to each stage of the purchasing journey. As consumers get closer to the cart, these brand-led, creative messages become more functional, providing the information consumers need to complete their purchases with ease.<sup>15</sup>



03

# Loyalty

From brand purpose  
to human purpose



←BACK

Recommended  
by your  
personal  
stylist

ADD TO CART

BROWN BLUE PINK

Care +

Materials +

Warranty +

# Create a partnership that's human by design to build trust and earn loyalty.

## Where consumers are

Consumer trust is alarmingly low. Only 39% trust companies to have good intentions, and just 43% trust them to make honest claims. Yet, it's no secret that winning consumers' trust is key to building enduring loyalty — they have the choice to return to a particular company or seek something else. Consumers who trust companies are 54% more likely to buy from them again and 73% more likely to recommend that company to others, according to our analysis.

# 78%

of consumers say it is important for conversational AI advisors to recognize them and remember their preferences.



## Where consumer-facing organizations should go

Companies cultivate trust through the flywheel effect, learning what consumers need, delivering it, and using what they learn to make increasingly relevant recommendations. But recommendations are only as good as the information that companies get from consumers. Some will share their personal data in exchange for value — namely, hyper-personalized experiences. In many cases, however, organizations must analyze the digital breadcrumbs that consumers leave behind to understand their needs.

The opportunity for companies is to use generative AI tools and assistants to sharpen this value exchange with consumers, and in the process, close the trust gap and cultivate loyalty. This human-by-design technology can quickly gather and analyze structured, unstructured and synthetic data to understand consumers deeply. The deeper the understanding, the more tailored value companies can offer, and the better positioned they are to build a foundation of trust through relevance.

Because of how they understand consumers, generative AI tools make it possible for organizations

to design experiences based on human purpose, not brand purpose. This is a profound shift. It enables companies to create “human” relationships with consumers that extend beyond a single purchase, so they become embedded in people’s lives. It means providing enhanced support to consumers that reaches beyond the product they originally came for. It’s human connection, not points-based programs, that drives enduring loyalty. This can also fuel new growth opportunities through human-centered innovation — in other words, the more companies understand about the consumer, the better grasp they have of real needs. With this knowledge, companies can create brand stickiness that makes switching to another less appealing.

Japan Airlines is making human connections in an ingenious way that makes complete sense for travelers’ lives. Despite all the work that goes into planning a trip, our research shows that consumers are most overwhelmed by the detailed preparation and packing.<sup>16</sup> Travel companies don’t typically help here — Japan Airlines is trialing a service that would make it a notable exception. When flying to

Japan, travelers can rent a capsule wardrobe for the duration of their trip that’s tailored to the season and occasion.<sup>17</sup> Serving consumers more holistically not only creates new platforms for growth but can also drive deeper connections that fuel long-term loyalty.

“With enough personal information, these things are exceedingly useful for recommendations as opposed to relying on random reviews.”

**Man, 18-26,**  
United Kingdom



# A genius approach to loyalty

One way to build trust is to take consumers on a path of discovery. If companies understand consumers' explicit and implicit needs, they can surprise them with options they might not have uncovered themselves. Take **L'Oréal's Beauty Genius**, for example.

Beauty Genius is an AI-powered advisor that analyses consumers' skin to recommend what they need, using discovery as an engagement tool. A study by Gartner found that both B2B and B2C consumers were 1.73x more likely to buy more if they "realized something new about their needs or their own goals."<sup>18</sup> And those who feel the joy of discovery are 1.5x as likely to recommend the brand they bought from.

Integrating more than ten large language models, Beauty Genius is trained on over 6,000 images across an inclusive set of skin types and tested by makeup artists on more than 10,000 products. When it comes to using generative AI advisors to help with purchases, 76% of consumers want to be surprised with new suggestions that they wouldn't have otherwise considered. Beauty Genius captures this joy of discovery for consumers. When consumers use Beauty Genius, learning about products isn't just informative. It's highly engaging and inspires them to return time and time again.



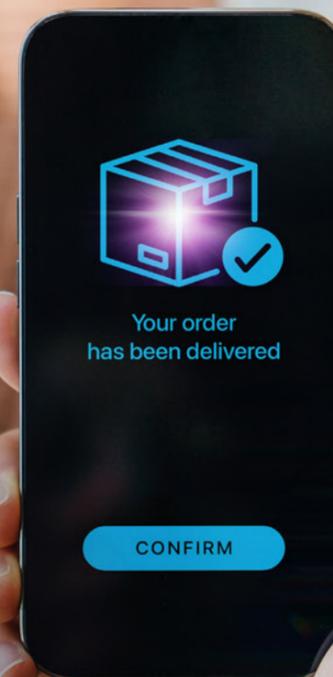


# Protecting information protects loyalty

Advisors are only as good as the data they're trained on. With unified data platforms, improving data quality for generative AI advisors can also enhance how information is presented across the entire universe of channels and touchpoints a company engages in. Although critical inputs for consumers, it's this public information that will also become critical inputs for third party advisors, from which they will generate their own recommendations.

If this information is factually incorrect or incomplete, there's a risk that third-party advisors will overlook or misrepresent products — or even actively steer consumers away from buying them. Just as SEO seeks to improve the findability of results through search engines, companies will need to employ similar strategies to ensure their products and services show up in the right way both through their own AI-powered solutions and that of third parties as well. This is a brand-new responsibility that would likely require upskilling for digital marketers.

**Be data-powered  
and delightfully human**



We are at a defining moment in the relationship between consumer-facing organizations and consumers. The trifecta of generative AI, other technologies and new ways of working is a catalyst for companies to empower consumers along the path to purchase in ways that weren't possible even a year ago. It's how they can respond to the nuance of consumer needs and behaviors, and reduce their workload.

**This opportunity calls for bold reinvention across the value chain. The fundamental enabler — what makes it possible to understand and engage consumers — is being data-powered and delightfully human.**

Companies need a robust data foundation, part of a strong digital core, to maximize the potential of generative AI and get the most out of their data. They need to have structured, unstructured and synthetic data in unified data platforms to understand consumers in human terms. This isn't only about what consumers need. It's also about knowing how they want to engage — everything from the channels and formats they prefer to how their daily life influences their purchase decisions. Using this information to build strong relationships enables companies to make better recommendations and sets them in a good position in the ongoing battle for relevance.

While companies develop this strong data foundation, they should make decisions with a “delightfully human” mindset. Human experience should be the touchstone. So, instead of focusing solely on removing the pain points of the journey to purchase, organizations should also consider what gets consumers excited about the process. For many consumers, shopping isn't purely transactional. It's a way to explore, learn, experience and connect with others. A full 62% of consumers find some part of the shopping experience fun or exciting. Companies should lean into creativity to infuse the spirit of fun and engagement into consumers' interactions with AI advisors. It's a key part of driving both connection and advocacy amid all the noise.

The digital core leverages the power of cloud, data and AI through an interoperable set of systems across the enterprise — including platforms, automation, integration and security — allowing for rapid development of new capabilities.

Structured data is data that is organized in a standardized manner and easily searchable. Examples include product master data, inventory or purchase histories. By contrast, unstructured data has no pre-defined format, and requires AI to process and use. Examples include customer service transcripts, images, social data or biometrics. Synthetic data is artificially generated to mimic real data at scale. For example, synthetic consumer profiles can be generated to minimize bias in a consumer dataset then simulate consumer behavior.

76%

of consumers who have some fun while shopping are likely, very likely or always recommend the brand to others.



Consumer-facing companies have always been grounded in relationships with consumers, and those relationships are constantly changing. Right now, consumers want a lighter load and a quieter experience of making purchases. **Ultimately, companies that empower the consumer with simpler experiences will drive loyalty and breakthrough growth.** Technology that is human by design has tremendous potential to transform the buying experience — and people are increasingly open to it. This is a huge shift, and it's happening now.

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## About the research

Accenture's Consumer Pulse Research 2024 explores how consumer sentiment, behaviours and expectations are driving change for consumer-facing industries. This year's research offers insights into consumer decision making, with a particular focus on the implications this will have for the consumer goods and services, retail and travel industries. Online focus groups were held during the week of October 30, 2023 in the USA, UK and India to investigate our initial hypotheses. These were then tested by surveying a representative sample of 19,050 consumers from 12 countries: Australia, Brazil, Canada, France, Germany, Greater China, India, Japan, Spain, UAE, UK and USA. The survey was conducted online and was conducted between December 6 and December 12, 2023. Analysis allowed for comparisons across various demographic factors such as age, or income, as well as behavioural attributes like an individual's typical decision-making style. It also included focused deep dives on the challenges faced by consumers along the consumer journey for eight categories: beauty products, clothing, consumer electronics, flights, groceries, hotels/resorts, OTC remedies and snacks.

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